



Nebraska Public Employees Retirement Systems

1221 N Street, Suite 325

P.O. Box 94816

Lincoln, NE 68509

402-471-2053

800-245-5712

Fax: 402-471-9493

Name <small>Last First Middle</small>		Date of Birth <small>- -</small>	Plan Type <small>(Check One)</small>
Social Security Number <small>- -</small>		Retirement Number(s)	<input type="checkbox"/> School <input type="checkbox"/> State <input type="checkbox"/> County <input type="checkbox"/> Judges <input type="checkbox"/> Patrol <input type="checkbox"/> DCP
Address <small>City State Zip</small>			
Home Phone	Work Phone	Employer	

Withholding Certificate for Annuity Payments

If you are a new retiree or benefit recipient and do not complete and return this form, we are required to withhold federal and Nebraska state income taxes as if you are a married individual claiming three exemptions.

NEBRASKA RESIDENTS—Fill out ONLY this section. Check appropriate box.

A. ☐ I want federal and state income taxes withheld from my periodic annuity payments, based on the exemptions and marital status I claim below:

Total number of exemptions _____

Marital Status: ☐ Single ☐ Married ☐ Married, but withholding at a higher single rate

OPTIONAL (Fill out ONLY if you choose A)

Additional monthly federal withholding \$ _____ (No percentages or fractions)

Additional monthly state withholding \$ _____ (No percentages or fractions)

B. ☐ I do NOT want federal OR state income tax withheld.

C. ☐ I do NOT want federal income tax withheld BUT please withhold a FLAT AMOUNT of \$ _____ for state income tax.

NON-RESIDENTS OF NEBRASKA—Fill out ONLY this section. Check appropriate box.

A. ☐ I WANT federal income tax withheld from my periodic annuity payments, based on the exemptions and marital status I claim below:

Total number of exemptions _____

Marital Status: ☐ Single ☐ Married ☐ Married, but withholding at a higher single rate

OPTIONAL (Fill out ONLY if you choose A)

Additional monthly federal withholding \$ _____ (No percentages or fractions)

B. ☐ I do NOT want federal tax withheld.

Questions regarding your individual tax liability should be directed to your accountant, the Internal Revenue Service and/or the Nebraska Department of Revenue. The Public Employees Retirement Systems staff are not qualified to answer your personal tax questions.

IMPORTANT: I realize I am liable for payment of federal income tax on the taxable portion of my annuity and that I may be subject to tax penalties under the estimated tax payment rules if my payment(s) of estimated tax and withholding are not adequate.

I hereby submit this Withholding Certificate regarding how my benefit is to be treated for purposes of federal and Nebraska state income tax withholding.

Signature	Date
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